

Facilitating a Good Meeting

Presented to PMUG

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By Dirk Huggett

Good afternoon everyone, I am excited to be here and hopefully provide to you some information on how to make your meetings more productive. Raise your hands. How many of you have walked out of a meeting thinking “Man, that was a waste of an hour!”? Or worse, how many of you have walked away thinking “What was the purpose of that?”? I think most of us can all say we have been there, or that we have lead meetings like that. My goal today is to give you some tools to make sure no one walks away from your meetings thinking things like that, and you walk away with the goals you set out to meet. A word of warning, I don’t have a magic wand. Good meetings require a lot of work and time. But think about it. Wouldn’t you rather have one good meeting a little bit later and get what you need, than to rush a meeting and only walk away with a few small pieces, or... in worse shape than when you entered.

As project managers, you all lead meetings. If you begin to consistently run good meetings, people will recognize that, and you can spread the lessons you learn to others so that even meetings you don’t run become more successful.

Agenda

- Opening
- Exercise
- Four keys to a successful meeting
- Closing
- Next Session

As I mentioned, we want to leave today with a better understanding of how we can run better meetings. So first we are going to talk about the four keys to a successful meeting. I originally learned many of these techniques over a 3-day course. I have managed to do a highlight presentation in about 3 and ½ hours. Today I've got 40 minutes. So one of the things that I have done is broken this out into two sessions. We will cover 3 of the 4 keys to success today, and leave the 4th key until next time.

Before we go any further, I want to give you a chance to ask any questions or add something to our list that I may not have here.

Exercise

- Characteristics of a good meeting
- Characteristics of a bad meeting
- Things to do to make a good meeting
- Things not to do to make a good meeting

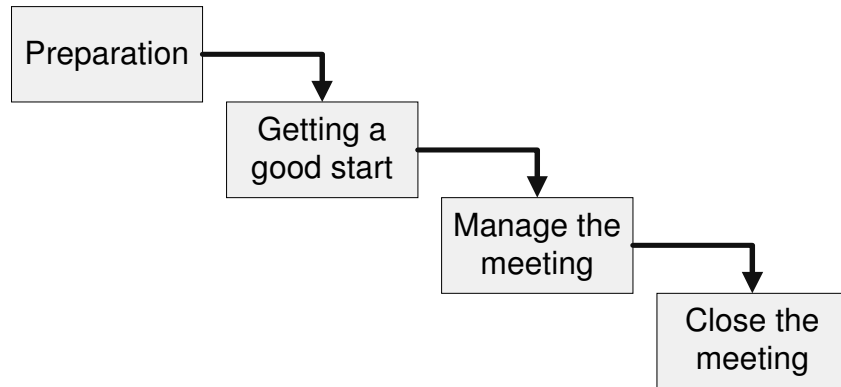
I want to start us off with a short exercise. First let's divide out into four groups. Each group take a flip chart. You have one minute to think of as many items as you can relating to the statement on your chart, at the end of one minute, move in a clockwise position to the next flip chart and begin adding to the list begun by the previous groups. We will do this until everyone has had a chance at each board.

Start now.

Review charts.

This is a good way to perform brainstorming in a short timeframe. It is interactive and helps make sure everyone gets involved, even if it only means they walk around with the group. It is also a great way to overcome nap time problems. Those generally occur between 10:30 – 11:00, 1:30 – 2:00, and between 3:00 – 3:30. We will touch on more things you can do to overcome nap time in the next session.

Keys to a Successful Meeting



There are four keys to a successful meeting. Preparation; getting a good start; Managing the meeting; and closing the meeting. Today we will cover the first two and closing. The next session will focus on what to do during the meeting.

Preparation

- Clearly understand the objective

The first key is preparation. It is also probably the one that is most often minimized due to time constraints. However, just like any other project management activity, the more planning you do at the beginning, the better your results.

The first item in preparation is to clearly understand your objective. What exactly do you want coming out of this meeting? Is it a particular deliverable or part of a deliverable? Is it consensus on a methodology? Is it a list of ideas? You need to have something solid. If it is not your objective and you are just facilitating for someone else, you need to work closely with the sponsor to determine what the objective is.

Preparation

- Clearly understand the objective
- Understand who will play the key roles
 - Project Sponsor
 - Project Manager
 - Methodologist
 - Documenter
 - Timekeeper
 - Participant
 - Observer

This leads us to the next item. You need to understand who will play the key roles. One person can play multiple roles in a meeting, but it's difficult to do them all.

For example: It is very hard to lead a discussion and document results at the same time. It is also difficult to participate and be the timekeeper. Engage the group in assisting you with these assignments if you can't bring in an assistant to help you.

Preparation

- Clearly understand the objective
- Understand who will play the key roles
- Prepare sample deliverable
- Prepare detailed agenda
- Educate the attendees
- Prepare the room
- Prepare your opening

Often you will want to prepare a sample deliverable to make sure you get all of the information you need, can express your goals for the meeting or make sure the meeting sponsor is going to get what they need.

Next prepare a detailed agenda. This is how you plan what types of activities you will need to do to get to your objectives

Be sure that the meeting attendees are aware of meeting objective. They need to be able to prepare themselves to participate in the topic, perhaps suggest other attendees, and possibly bring key data with them. How many of you have been to a meeting to find out you need another meeting so everyone can bring more information with them?

On the day of the meeting be sure the room is ready. Make sure everything you need is set-up and prepared. Be sure you have wall space to put the ground rules and parking boards up. Give yourself enough time to do your setup and still be free time to meet & greet your participants as they arrive.

Finally, prepare your opening comments and memorize them. Your opening words should inform, excite, empower & involve the participants. Your opening needs to put everyone at ease and prepare them for the meetings activities.

Getting a Good Start

- Set up with time to spare
- Use the gathering time
- **START ON TIME!**
- Set the stage with your opening
- Review agenda
- Establish ground rules
- Define consensus
- The parking boards

That leads us to the next key to a successful meeting; getting it off to a good start. As I mentioned before, be sure to give yourself enough time to set up. Try to make sure you are set up with enough time to spare so you can do one last rehearsal of your opening before attendees begin to arrive.

Be sure to use the gathering time. Find the individuals whom you have identified as potential challenges and establish a rapport with them. Some other things you can do is ask for their help in keeping the session on track or reassure them about the focus of the session.

Think back to the last five meetings you have attended. Picture the start times for each meeting. How many actually started on time?

<<Select a few people for response>>

How many are you not sure about because you were late? Did you know that only 38% of meetings start on time. The key here is to not penalize those people who were prompt. It only takes a few times before you get the reputation that your meetings start and END on time. Once the reputation is earned, you will be amazed at how prompt people can become. Give everyone a two minute warning prior to the start time. This allows them to finish the conversations they are having and find their places. If someone else is providing the opening remarks, be sure they are aware they need to be present early and that you intend to start exactly on time.

Next, set the stage with your opening. Inform your participants about what is the objectives or what is going to happen. Excite them about the benefits that will come out of the objectives results. Involve them early on. Get them to speak or raise their hands. And empower them. Discuss the role that they play

The Parking Boards

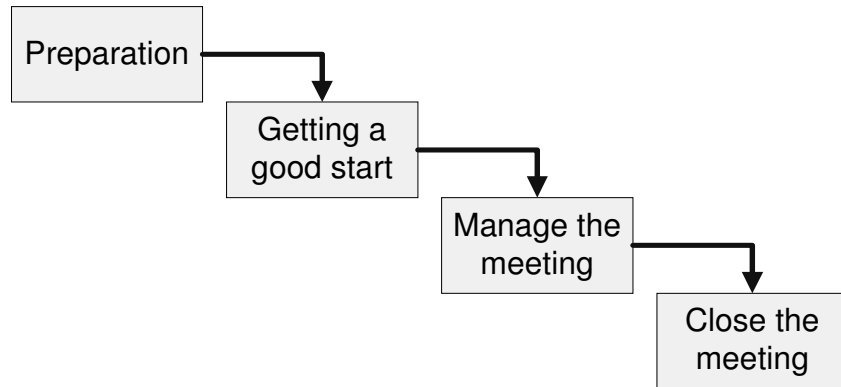
- **Issues List** – Items relevant to the session that require a decision but will be discussed later in the session or outside the session.
- **Decisions List** – Decisions that are made by the participants during the session
- **Actions List** – Actions to be performed sometime after the completion of the session.

You want to use the issues list for those items that are brought up out of sequence or for things that need to be moved to another discussion.

The decisions list can help keep you moving when someone wants to go back and reopen an issue. This doesn't mean that you won't do that, but you can go back to the decision board and say that earlier the group had made this decision, does the group feel they need to reevaluate that decision again.

The actions list is what you will need to use to make sure that everything that needs to be done outside of the session is assigned and that people are clear what those assignments are.

Keys to a Successful Meeting



Our next key is managing the meeting. However, there is so much to cover on this, I moved it to the next session. So we will wrap up today with closing the meeting.

Closing the Meeting

- Ask for time extensions if needed
- Review activities performed
- Review parking boards
- Evaluate
- Close & set the stage for any next steps

If a session is going to run long, first alert the participants. Next, conservatively estimate how much more time you will need. Then ask the attendants if you should just continue on or set another time. Check the impact of continuing, such as anyone who can't. This may change the decision. Finally confirm the agreement.

When you do wrap up, do a review of the activities performed. With each objective, ask the participant if it was fulfilled.

Reviewing the parking boards is very important. Review the decisions list to remind the participants what was accomplished and to confirm consensus. Next review the issues list. Ask "Have we covered it?, Do we need to cover it? Do we need to do it now?" If you do not go through the issues on the board, the next time you suggest using it, people won't trust that it will every be addressed. Finally review the actions list to ensure everyone is aware of any assignments to be made, due dates and other expectations.

There may be times where handing out a short evaluation on the method of the meeting will make sense. After all, it is hard to improve something that you are unaware needs improvement.

Finally thank the participants and remind them of the role their effort plays in the overall objective. Lay out any next steps that need to be taken and formally end the session.

Review of the Agenda

- ✓ Opening
- ✓ Exercise
- ✓ Four keys to a successful meeting
 - ✓ Preparation
 - ✓ Getting a good start
 - ✓ Closing the meeting
- ✓ Closing

So with that said, let's review our goals.

I started out with setting a goal of leaving today with a better understanding of how we can run better meetings.

We next did an exercise that got everybody involved and energized yet contributed to our overall goal.

I then ran through three of the keys to a successful meeting: Preparation; Getting a good start; and closing the meeting.

Now I want to thank everyone for attending today and I hope you have some useful ideas to help you get more from the meeting.

Next Session Preview

Manage the Meeting

- Focus the group
- The power of the pen
- Information gathering
- Group Dynamics
 - Managing dysfunction
 - Consensus building
 - Keeping the energy high

This is a preview of what we will cover in the next session. We will focus on the things you need to do during the meeting to help ensure success.

More Help

Based upon “*The Effective Facilitator*”

by Leadership Strategies, Inc.

www.leadstrat.com

Questions?

If you are interested in more on this topic, I based this presentation on a class I took from a company called Leadership Strategies, Inc. It was a three day course entitled “The Effective Facilitator”. I also took the one day follow-up course on “Facilitating IT Sessions”. More details can be found on their web site shown here or drop me a note and I can forward some contact information to you.

That is all I have. Are there any questions?

Thank you for your participation.